

User Guide

NAPIS SRT

Version 2.0
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Administration on Aging Office of Evaluation
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Washington DC 20001
Web site: www.aoadatacommunity.us

NAPIS State Reporting Tool

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Introduction

The National Association of State Units on Aging (NASUA), with funding from the Administration on Aging (AoA), has engaged a third-party vendor to develop a software reporting structure for the State Program Report (SPR) section of the National Aging Program Information System (NAPIS).

This effort was initiated to accomplish three primary tasks:

1. Reduce SUA reporting burden, i.e., client detail information, system edits, validity checks and requirements for transmission.
2. Incorporate required information regarding the National Family Caregiver Support Program.
3. Comply with Office of Management and Budget (OMB) reporting requirements regarding reporting classifications, e.g., race and ethnicity.

The resulting system is the NAPIS State Reporting Tool (NAPIS SRT). NAPIS SRT will help State Units on Aging to create, edit and validate SPRs and to create transmission files for submitting data to AoA. Through this project, NAPIS SRT will be provided to all State Units on Aging free of charge. Training on use of the system will also be provided to SUAs as part of this project.

About NAPIS SRT

NAPIS SRT offers several features that make preparing program reports faster and easier.

- XML, Excel and DBF Import – many database systems can export to XML, Excel and DBF files. Import files destined for NAPIS SRT need to conform to the appropriate schemas supplied by AoA.
- Efficient report data entry – the data entry screens are based on the paper based SPR.
- Use the SRT's powerful roll-up report functionality to create a single, state report based off of multiple agency reports.
- Error correcting tools – NAPIS SRT offers several tools to help you clean up data for submission.
- Flexible print options – print out one or more sections of the report of the whole report quickly and easily.
- Easy submission – NAPIS SRT supports one-click automated report submission.

About the Documentation

The goal of the documentation is to describe the procedures and provide any extra information you will need to use the program. In the case of the printed manual, the documentation was not meant to be read cover to cover. If you are comfortable using the Windows® operating system, skip to ***Using NAPIS SRT*** for an outline of how to use the software.

System Requirements

- Windows 7 or Windows XP SP3
- Internet Explorer 7, 8 and 9
- 2.0 GHZ processor or better
- 40-45 Kbps (kilobytes per second)

Working in NAPIS SRT

Working in NAPIS SRT describes screen features and basic procedures, including starting and exiting the program.

If you are comfortable using Windows® based programs, you will probably want to skip most of this section.

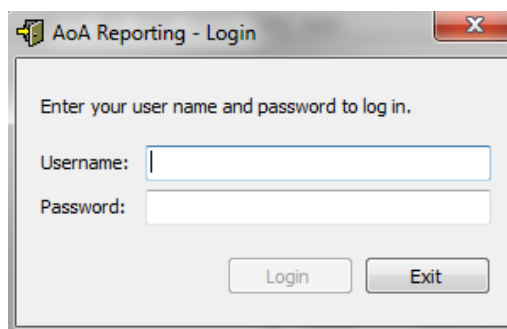
If you are not confident in using Windows or are new to using a computer, read through most of this section. It should help you better understand how to work in NAPIS SRT.

Using NAPIS SRT contains step-by-step procedures on how to create, edit, and submit reports.

Start and Log In

➤ To start and log into NAPIS SRT

1. From the Windows **Start** menu, select **Programs** (or **All Programs** in Windows XP) then US Administration on Aging, then **SRT**.
2. Your computer displays the NAPIS SRT Log In screen.



3. Enter your Username and Password
4. Click Login to start the program.
5. After you have logged into the application you will be presented with the Select Reporting Module screen.



- If you are creating a State Report click on State Program Reports button.
- If you are creating a ARRA Report click on the ARRA Reports button.

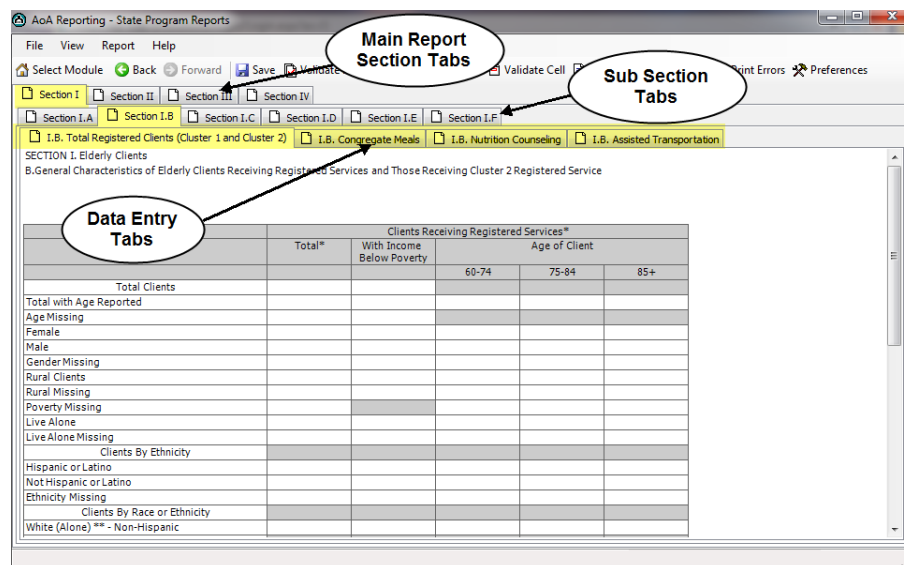
Working in NAPIS SRT describes screen features and basic procedures, including starting and exiting the program.

The goal of the documentation is to describe the procedures and provide any extra information you will need to use the program. In the case of the printed manual, the documentation was not meant to be read cover to cover. If you are comfortable using the Windows® operating system, skip to ***Using NAPIS SRT*** for an outline of how to use the software.

Data Tabs

NAPIS SRT uses four main header tabs to display program reports. The tabs organize information so that you can find what you are looking for quickly amidst lots of information. When you click on the section header tab, individual

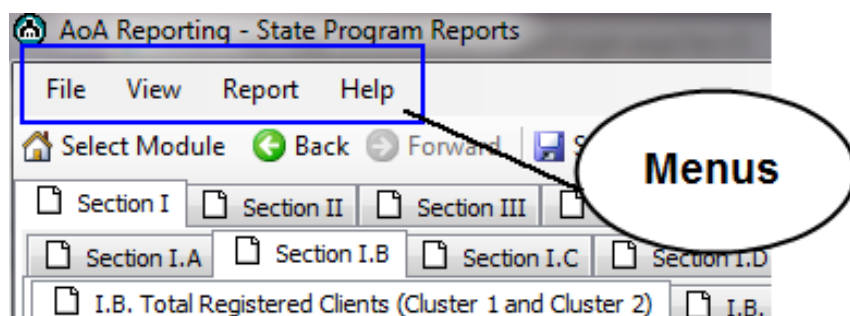
sub section tabs display below the section header tabs. Click on a sub section tab and data entry tabs display.



Working in NAPIS SRT describes screen features and basic procedures, including starting and exiting the program.

Menus

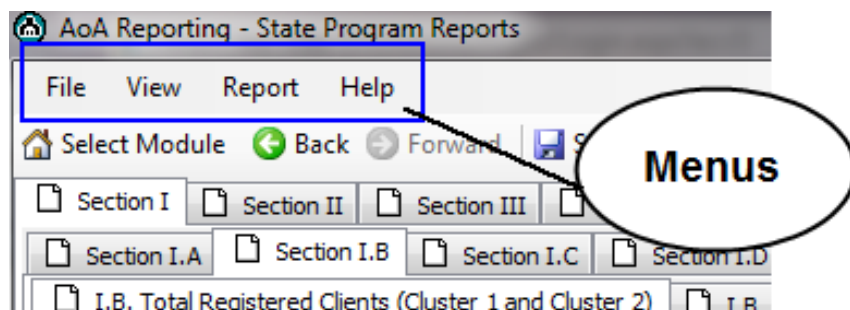
The NAPIS SRT menus are located directly below the *AoA Reporting* title bar. Menus give you access to functions of the program. NAPIS SRT contains these menus: **File**, **View**, **Report** and **Help**. Other menus appear as you access different areas of the program



Toolbars

The NAPIS SRT menus are located directly below the *AoA Reporting* title bar. Menus give you access to functions of the program. NAPIS SRT

contains these menus: **File**, **View**, **Report** and **Help**. Other menus appear as you access different areas of the program



Moving Between Fields

Use the UP ARROW and DOWN ARROW on the keyboard to move between fields. The ENTER key moves you to the next field.

Shortcut/CTRL Keys

Some frequently used NAPIS SRT menu options have shortcut keys, which are displayed to the right of the option. These shortcut keys can be used to access a function without having to open a menu. For instance, to save without using the mouse, hold down the CTRL key while pressing the S key.

ALT Keys

All menus and option buttons in NAPIS SRT have labels with one letter underlined. If the ALT key is pressed in combination with the underlined letter, the effect is the same as clicking the menu or button with the mouse. For example, the **F**ile menu can be opened by holding down the ALT key while typing an F. Use ESC for **C**ancel and **C**lose.

List or Grid Screens

NAPIS SRT displays program reports in a *List Screen*. *List Screens*, also known as *Grids*, display several records in a list, similar to a spreadsheet. Each row contains one record. Columns divide each row, listing key information about each record. To open a record, double click the row of the entry.

Sorting Information

You can sort the records in a list screen by clicking the column headings. Click the appropriate column heading once to sort the records according to the data that appears in that column. The program sorts in ascending order by default. Click the same column heading once more to sort the information in descending order.

Refreshing List Screens

Most list screens have a **Refresh** button. As you add or edit records, the records displayed by a list screen may not reflect the most recent changes to the database. When you click **Refresh**, NAPIS SRT updates the list screen with current data.

Formatting Columns

NAPIS SRT allows you to format the columns of the *Report list (grid) screen*. You can change the size and number of columns in view, the sort order of the data, and the order of the columns themselves.

➤ ***To adjust column widths***

1. Hover the mouse over the right border of a column heading.
2. When the pointer becomes a double-headed arrow, click and hold down the mouse button.
3. Drag the column border to the left or right.
4. Let go of the mouse button.

➤ ***To adjust the column to fit the column contents***

1. Double-click the right border of the column heading.

Changing List Screen Sort Order

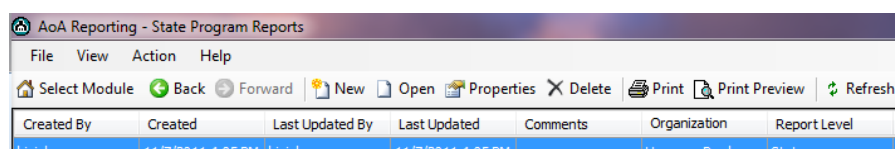
You can easily change the order of the data that appears on a list screen.

➤ ***To change the sorting of a list screen***

1. Click the appropriate column heading once. The records sort themselves in ascending order according to the data that appears in the column.
2. Click the same column heading once more to sort the information in descending order.

Navigating the Report List Screen

To navigate through the report list screen you will use Menu Bar which contains several buttons.



- **Selection Module** – takes you back to the main AoA Reporting page where you can select to run an SPR Report or an ARRA report
- **Back** and **Forward** - used to navigate between pages.
- **New** – used to generate a new report.
- **Open** – used to open a selected report to view and edit contents.
- **Properties** – displays contact information about the submitter and details about the selected report.
- **Delete** – used to delete a selected report from the list view screen.
- **Print** – used to print the list view screen.
- **Print Preview** – used to preview the list view screen before printing.
- **Refresh** – updates the list view screen with recent modifications.
- **Submit** – submits your validated report automatically to the AoA.
- **Certify NSIP** – allows state users to electronically confirm the validity of their NSIP numbers.
- **Certify SRP** – allows state users to confirm the overall validity of the SPR
- **Fiscal Year** – allows user to filter report list by fiscal year
- **Report Level** – allows users to filter the report list by Agency or State reports.
- **Agency** – allows user to filter the report list by submitting agency.

Exiting NAPIS SRT

- **To exit NAPIS SRT**
 1. From the **File** menu, choose **Exit** or click the **X** icon on the title bar.

Using NAPIS SRT

You can use NAPIS SRT to generate both annual (See “Annual Reports”) and Quarterly (See “Quarterly Reports”) Reports. Process for creating and submitting both types of reports is very similar.

Quarterly report support American Recovery and Reinvestment Act (ARRA) reporting. This section outlines the individual procedures used to create a valid report. The checklist below describes the general process you will go through to get your quarterly and annual data ready for submission.

NAPIS SRT Checklist

- 1.** Create a New Report (see "Creating Reports")
- 2.** Edit the report as needed to clean up data.
- 3.** Validate the data (see "Validating Data")
- 4.** Correct any errors (see "Correcting Errors") that the program has found. NAPIS SRT offers several error correction features including the ability to print parts or all of the report (see "Printing Reports").
- 5.** Re-validate the report (See "Validating a Report")
- 6.** Submit the Report (see "Submitting a Report").

Creating Reports

NAPIS SRT creates two types of reports: State Reports and Agency Reports. A State Report is a report covering all agencies in the state which provides information on the effectiveness of social programs geared towards the elderly under the Older Americans Act. An Agency Report is a version of the State Report containing data for only one agency. You can run SPR reports based on annual data (see "Annual Reports") and ARRA reports based on quarterly data (see "Quarterly Reports").

Reports can be created by using one of three methods: from a blank report, from agency "rollup" reports, and from an import. This section looks at the first 3 sections of report creation. See Importing Reports for more information on importing from DBF, XLS and XML files (for either annual or quarterly reports).

NAPIS SRT can copy developmental accomplishments in Section IV from one report to another. See Copying Report Accomplishments for details. Note that this only applies to annual reports.

Annual Reports

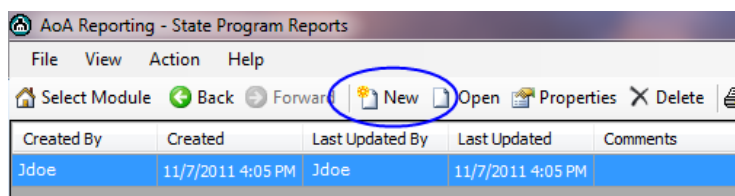
AoA requires both annual SPR reporting and quarterly ARRA reporting. Annual Reports are much more detailed than **quarterly reports** and are submitted to AoA yearly.

Annual Blank Program Reports

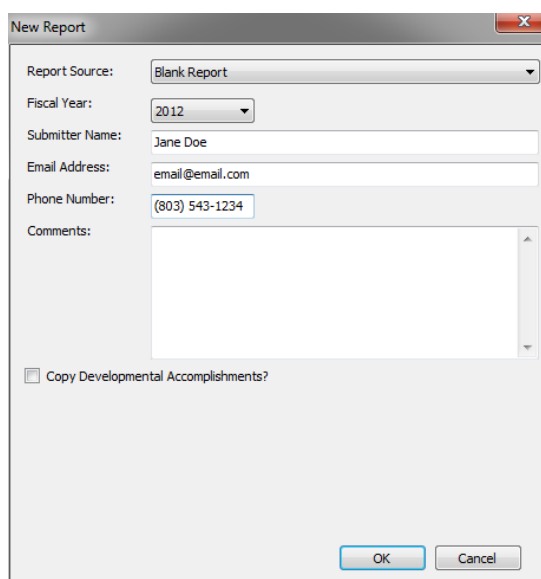
You can create annual State Program Rollup or Agency Reports starting from a blank report. If you're importing files (See "Importing Reports"), NAPIS SRT creates a new report automatically based on the type of file you import.

➤ **To create a new annual blank program report**

1. Click the **State Program Reports** button or select State Program Reports from the View menu in the Select Module screen.
2. Click the **New** button.



3. Select Blank Report in the *Report Source* dropdown list.
4. Under *Fiscal Year*, select the correct reporting **Year**. The current year will default.



The screenshot shows a 'New Report' dialog box with the following fields and options:

- Report Source: Blank Report (dropdown menu)
- Fiscal Year: 2012 (dropdown menu)
- Submitter Name: Jane Doe (text field)
- Email Address: email@email.com (text field)
- Phone Number: (803) 543-1234 (text field)
- Comments: (large text area)
- ☐ Copy Developmental Accomplishments?
- OK button
- Cancel button

5. *Submitter Name, Email Address* and *Phone Number* will prepopulate with the user information. This e-mail address is where your confirmation e-mails will be sent after submitting your report.
6. Enter any comments, as needed.
7. Indicate if you want to *Copy Developmental Accomplishments?* by placing a check in the box.
8. Select the report that you want the Development Accomplishments to be copied from. Click OK after you have made the selection.
9. Click **OK**.
10. NAPIS SRT brings you to the Report Data Entry screen. Review information and change fields as needed. As you work, click Save periodically.
11. Click the *Save* button to save the report.
12. Use the *Back* button to navigate back to the main report selection page

Annual State Program Rollup Reports

NAPIS SRT can create annual State Program Rollup Reports by "rolling-up" or adding together several agency reports. When rolling up reports, the agency report date ranges must match those of the rollup report you are creating.

- ***To create an annual state program rollup report***

1. Click the **State Program Reports** button or select State Program Reports from the View menu in the Select Module screen.
2. Click the **New** button.
3. Select **Rollup Report** from the *Report Source* dropdown list.
4. Enter a *Report Name*.
5. Under *Fiscal Year*, select the correct reporting **Year**. The current year will default.
6. *Submitter Name*, *Email Address* and *Phone Number* will prepopulate with the user information. This email address is where your confirmation emails will be sent after submitting your report.

New Report

Report Source: Rollup Report

Report Name: FFY 2012

Fiscal Year: 2012

Submitter Name: Jane Doe

Email Address: email@email.com

Phone Number: (803) 543-1234

Reports:

Include?	Region	State	Organization Name	Created
<input checked="" type="checkbox"/>	I	HA	Harmony Aging	JDo
<input type="checkbox"/>	I	HA	Harmony Aging 1	JHD

[Select All](#) | [Deselect All](#)

Comments:

OK Cancel

7. In the *Reports* screen, select the reports you need for the new rollup report.

New Report

Report Source: Rollup Report

Report Name: FFY 2012

Fiscal Year: 2012

Submitter Name: Jane Doe

Email Address: email@email.com

Phone Number: (803) 543-1234

Include?	Region	State	Organization Name	Created By
<input checked="" type="checkbox"/>	I	HA	Harmony Aging	JDo
<input type="checkbox"/>	I	HA	Harmony Aging 1	JHD

[Select All](#) | [Deselect All](#)

Comments:

OK Cancel

8. Enter any comments, as needed, in the *Comments* section.
9. Click **OK**.
10. NAPIS SRT brings you to the *Report Data Entry* screen. Review information and change fields as needed. As you work, click **Save** periodically.
11. Click **Save** and then the **Back** button to close the report.

Quarterly Reports

Quarterly reports support American Recovery and Reinvestment Act (ARRA) reporting. You are required to submit an ARRA Report to AoA four times a year. A Quarterly Report is considerably less detailed than the Annual Report, and looks only at the totals for Home Delivered and Congregate Meals found in Section II.A of the report.

For more information about ARRA, visit:

<<http://www.recovery.gov/files/Initial%20Recovery%20Act%20Implementing%20Guidance.pdf>>.

Quarterly Blank Reports

You can create State Program Rollup Reports or Agency Reports quarterly starting from a blank report, or by importing xml or dbf files. If you are

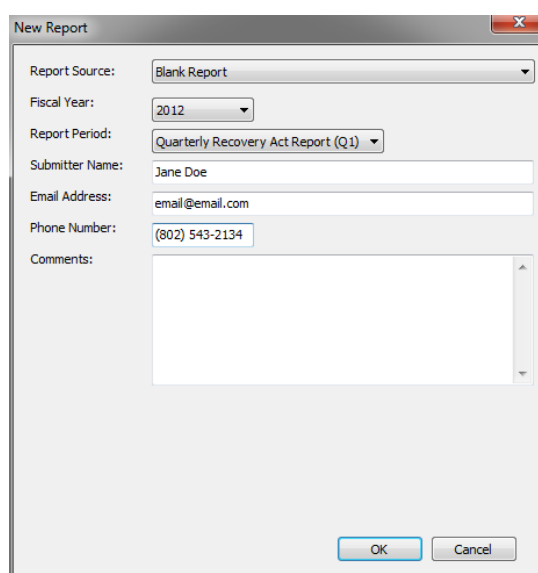
importing files (see "Importing Reports") NAPIS SRT creates a new report automatically based on the type of file you import.

➤ **To create a quarterly blank program report**

1. Click the **ARRA Reports** button or select ARRA Reports from the View menu in the Select Module screen.



2. Click the **New** button
3. Select the **Blank Report** from the Report Source dropdown list.
4. Under *Report Period*, select the quarter you are reporting on. Quarterly time frames are as follows:
 - **Q1:** 10/1 - 12/31
 - **Q2:** 1/1 - 3/31
 - **Q3:** 4/1 - 6/30
 - **Q4:** 7/1 - 9/30



5. *Submitter Name, Email Address* and *Phone Number* will prepopulate with the user information. This e-mail address is where your confirmation e-mails will be sent after submitting your report.
6. Enter any comments, as needed, in the *Comments* section.
7. Click **OK**.
8. NAPIS SRT brings you to the Report Data Entry screen. Unlike annual Reports, quarterly Reports contain very little data - the only sections you can enter data into are the *Home Delivered* and *Congregate Meals* lines found in Section II.A of the report. All other fields have been disabled. Within these areas, you can review information and change field entries as needed. As you work, click **Save** periodically.

9. When you have finished entering and reviewing data, validate the report. Just as with annual reports, the SRT can validate quarterly reports at the cell, section, or report level. However, since there are only six fields on one page, it makes the most sense just to validate at the Report level (See "Validating Report").

To successfully validate a report, remember that a report cannot contain all zeroes. Additionally, if you enter a number in any field in either the Home Delivered Meals or Congregate Meals rows, you must also enter numbers in the other two fields of that row.

10. Click **Save** and then the **Back** button to close the report.

Quarterly Rollup Reports

NAPIS SRT can create Quarterly Reports by "rolling-up" or adding together several agency reports. When rolling up reports, the agency report date ranges must match those of the rollup report you are creating.

➤ **To create a quarterly state program rollup report**

1. Click the **ARRA Reports** button or select ARRA Reports from the View menu in the Select Module screen.



2. Click the **New** Button.
3. Select **Rollup Report** from the *Report Source* dropdown list.
4. Enter a *Report Name*
5. Under *Fiscal Year*, select the correct reporting **Year**. The current year will default.
6. Under Report Period, select the quarter you are reporting on. Quarterly time frames are as follows:
 - **Q1:** 10/1 - 12/31
 - **Q2:** 1/1 - 3/31
 - **Q3:** 4/1 - 6/30
 - **Q4:** 7/1 - 9/30

New Report

Report Source: Rollup Report

Report Name: Sample Report

Fiscal Year: 2011

Report Period: Quarterly Recovery Act Report (Q1)

Submitter Name: Ryan S Burdick

Email Address: rburdick@harmonyis.com

Phone Number: (802) 316-4577

Reports:

Include?	Region	State	Organization Name
<input checked="" type="checkbox"/>	I	HA	Harmony Development
<input checked="" type="checkbox"/>	I	HA	Harmony QA
<input checked="" type="checkbox"/>	I	HA	Harmony QA
<input checked="" type="checkbox"/>	I	HA	Harmony QA

[Select All](#) | [Deselect All](#)

Comments:

OK Cancel

- 7.** *Submitter Name, Email Address* and *Phone Number* will prepopulate with the user information. This e-mail address is where your confirmation e-mails will be sent after submitting your report.
- 8.** In the *Reports* screen, select the reports you need for the new rollup report. Only items from the specified quarter are eligible for rollup.
- 9.** Enter any comments, as needed, in the *Comments* section.
- 10.** Click **OK**.
- 11.** NAPIS SRT brings you to the *Report Data Entry* screen. Review information and change fields as needed. As you work, click **Save** periodically.

AqA Reporting - ARRA Reports

File View Report Help

Select Module Back Forward Save Validate Report Validate Section Validate Cell Export Print Report Print Errors Preferences

Section II-ARRA

SECTION II. Utilization and Expenditure Profiles

A. Title III Utilization, Expenditure Profile (Except Title III-E)

For Selected Services	Number of Providers	# of AAAs Direct Services Provision	Unduplicated Persons Served	# of Persons Served at High Nutrition Risk	Service Units	Title III Expenditure	Total Service Expenditure	Program Income Received	OAA Title III Expenditures (\$) by Part			
									B	C1	C2	D
Cluster 1: Registered Services - Requiring Detailed Client Profile												
1. Personal Care												
2. Homemaker												
3. Chore												
4. Home Delivered Meals												
4a. NSIP Home Delivered Meals*												
5. Adult Day Care/Health												
6. Case Management												
Cluster 2: Registered Services - Requiring Summary Client Profile												
7. Assisted Transportation												
8. Congregate Meals												
8a. NSIP Congregate Meals*												
9. Nutrition Counseling												
Cluster 3: Non-Registered Services - No Client Profile Required												
10. Transportation												
11. Legal Assistance												
12. Nutrition Education												
13. Information and Assistance												
14. Outreach												
15. Other Services												
16. Health Promotion												
17. Cash and Counseling												
Total (Unduplicated)												

This is a quarterly Recovery Act report. All report figures are cumulative since the beginning of the grant.

rburdick Harmony Development

12. Click **Save** and then the **Back** button to close the report.

Copying Report Accomplishments

You can copy *developmental accomplishments* in Section IV.A and IV.B from an existing report into a new report. NAPIS SRT cannot copy developmental accomplishments into an agency roll-up report.

➤ **To copy developmental accomplishments**

1. Click the **State Program Reports** button or select State Program Reports from the View menu in the Select Module screen.
2. Click the **New** button.
3. Choose a report following process described earlier in this documentation.
4. Place a check mark in the "Copy Developmental Accomplishments" field.
5. Click OK.
6. Select the report you'd like to copy accomplishments from.
7. Press OK.
8. NAPIS SRT brings you to the Report Data Entry screen.

9. Begin data entry as outlined in Report Data Entry.

Editing Reports

If you edit a report that has been *Validated*, you will need to **re-validate the report** (see "Validating a Report") after saving your changes.

➤ **To edit an existing report**

1. Click the **State Program Reports** button or select State Program Reports from the View menu in the Select Module screen.
2. Highlight the report you'd like to edit.
3. Click Open on the toolbar.
4. NAPIS SRT brings you to the Report Data Entry screen.
5. Begin data entry as outlined in **Report Data Entry**. As you work, click **Save** periodically.
6. Click **Save** and then the **Back** button to close the report.

Report Data Entry

NAPIS SRT uses clean, efficient spreadsheet-like screens for most of the data entry into an SPR. The look of the sections is based on the paper-based SPR report. The sections of a program report are organized by *Title* and *Section*.

To begin data entry, click on the section header tab, by default the "Section I" will be active and sub tabs associated with that section will be displayed. You cannot enter data into most *Section Headings*. They are there to organize the data entry sections within the report and to display your progress.

A check mark icon on a tab means that the area has been validated. A blank icon indicates that either the section has not been entered or all changes to that section have been saved, but not validated.

Each section contains one or more sub tabs, based on the paper version of the SPR. You enter data directly into these tabs. After highlighting an appropriate tab, NAPIS SRT displays the Data Entry Cells. Highlight a *Data Entry Cell*. Use

your keyboard to enter the number or text. Use the ENTER key or the RIGHT arrow to move onto the next cell.

The screenshot displays the 'Report Data Entry Screen' of the NAPIS State Reporting Tool. The interface includes a menu bar with options like File, View, Report, and Help. Below the menu is a 'Section Heading Tabs' area with buttons for Section I, II, III, IV, and V. A 'Data Navigation Tabs' area is also present. The main area is a large table for data entry, with columns for 'Caregiver Characteristics' and 'Age of the Caregiver'. The table lists various categories such as 'Total Caregivers', 'Age Missing', 'Gender Missing', 'Race Missing', and 'Ethnicity Missing'. An 'Errors Pane' is located at the bottom, showing a list of errors and their descriptions. The errors pane is currently empty, showing only the headers 'Section' and 'Error Description'.

Caregiver Characteristics	All Caregivers	Under 60	Age 60-74	Age 75-84	Age 85 +
Total Caregivers					
Caregivers with Age Data					
Age Missing					
Female					
Male					
Gender Missing					
Race Missing					
Rural Missing					
Caregivers by Ethnicity					
Hispanic or Latino					
Not Hispanic or Latino					
Ethnicity Missing					
Caregivers by Race or Ethnicity					
White (Alone) - Non-Hispanic					
Total Minorities					
White (Alone) - Hispanic					
Am. Ind./Alaska Native (Alone)					
Asian (Alone)					
Black or African American (Alone)					
Native Hawaiian or Other Pacific Islander (Alone)					
Persons Reporting Some Other Race					
Persons Reporting 2 or More Races					
Race Missing					
Caregivers by Relationship					
Husband					

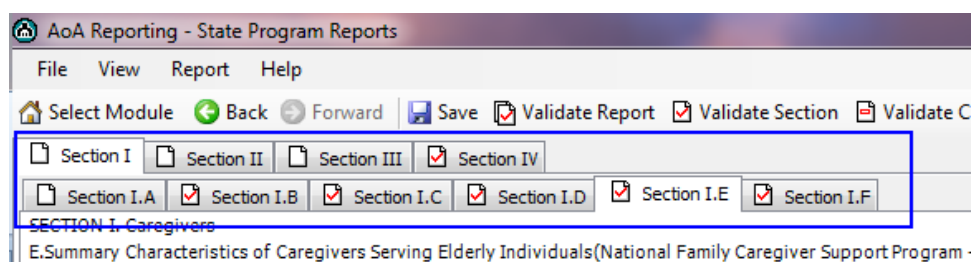
Section	Error Description
Section I.A	Section I.A is required. In order to submit an AOA-compliant NAPIS report this section cannot be blank.
Section II.A	Section II.A is required. In order to submit an AOA-compliant NAPIS report this section cannot be blank.
Section II.B	Section II.B is required. In order to submit an AOA-compliant NAPIS report this section cannot be blank.
Section II.D	Section II.D is required. In order to submit an AOA-compliant NAPIS report this section cannot be blank.
Section II.E	Section II.E is required. In order to submit an AOA-compliant NAPIS report this section cannot be blank.
Section III.A	Section III.A is required. In order to submit an AOA-compliant NAPIS report this section cannot be blank.
Section III.B	Section III.B is required. In order to submit an AOA-compliant NAPIS report this section cannot be blank.
Section III.C	Section III.C is required. In order to submit an AOA-compliant NAPIS report this section cannot be blank.
Section III.D	Section III.D is required. In order to submit an AOA-compliant NAPIS report this section cannot be blank.

After **validating the data**, (see "Validating Data") NAPIS SRT displays any errors in the *Errors* pane in the lower portion of the screen. Double click on the Error Description and the data cell will be highlighted.

Moving Through a Report

The SPR has many sections and subsections. NAPIS SRT offers multiple tools to move through an SPR as efficiently as possible.

NAPIS SRT displays the *Navigation Tabs* just above the *Report Data Entry* screen.



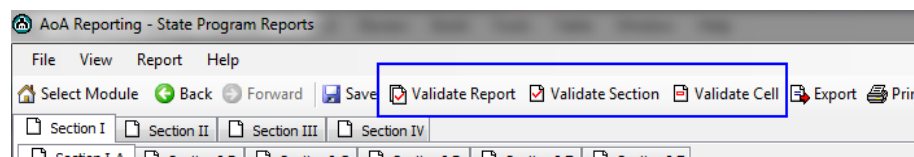
Entering Data into Cells

- **To modify numbers or data within a section**
- 1. **After creating a new report** (see "Creating Reports") or **accessing an existing report**, (see "Editing Reports") find the appropriate section and section with the cell you need to enter or modify.
- 2. The screen defaults to showing you the first section. Click on a different tab to see a different section.
- 3. The data entry cell of the section appears below the tabs.
- 4. Click a cell. Enter or modify information as needed. Press ENTER or use the RIGHT ARROW to continue moving through the cells.
- 5. When finished, click **Save** or to exit the report, click **Back** button.

Validating Data

Before your SPR can be submitted to the AoA, it must be *Validated*. The Validation process checks to make sure that a series of rules about the data in the report have been followed.

NAPIS SRT validates data at three levels: cell level, section, and report level.



Cell Level Validation

Cell level Validation validates just the cell that is currently selected in the Report Data Entry screen. Highlight a cell and press the Validate Report button on the toolbar to have the data within that cell be validated.

Section Level Validation

Section level Validation validates just the current Section displayed in the *Report Data Entry* screen. Use the tabs to navigate to a particular section in a program report. Once you access and have filled in data within the appropriate section, click **Validate Section** NAPIS SRT validates the current section and provides a list of any errors. See **Validating a Section** for detailed instructions.

Report Level Validation

SPRs need to pass *Report Level* Validation before receiving a signature for submission to the AoA. To validate a report, open the report from the *Reports* list screen and click **Validate Report**. NAPIS SRT checks all the data in the report. Several required sections of the SPR must have data and be error free before it can pass report level Validation. For more details on report Validation, please see **Validating a Report**.

The screenshot shows the 'AoA Reporting - State Program Reports' application window. The 'Validate Section' button in the toolbar is circled in blue. Below the toolbar, the 'SECTION I: Elderly Clients and Caregivers' is selected, and 'A. Elderly Client Counts' is displayed. A table shows the following data:

	Total
1. Unduplicated Count of Persons Served For Registered Services	5
2. Estimated* Unduplicated Count of Persons Served For	9
3. Total Estimated Unduplicated Count of Persons Served Through	104

* There is no prescribed method for developing this estimate.

At the bottom, an 'Error Description' pane shows an error for 'Section I.A': '#3 Total persons served may be no more than the sum of #1 Unduplicated Registered clients + #2 Estimated unregistered clients'.

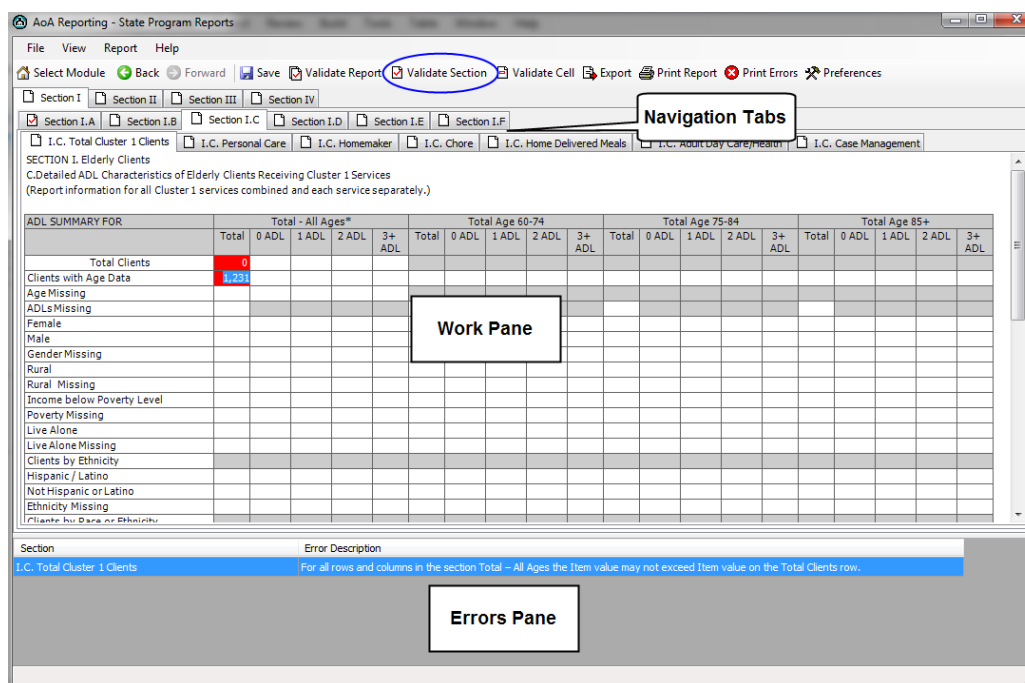
Validating a Section

When you validate a section within a program report, an *Error* pane appears in the lower right of the screen. Numbers in any cells related to the errors change

color. You can customize the colors that NAPIS SRT uses for error cells. See **Changing Report Colors** for more details.

➤ **To validate a section within a program report**

1. Open an existing report.
2. Navigate to the appropriate Section in the *Navigation* pane.
3. Highlight the section so that NAPIS SRT displays it below the tabs.
4. Click **Validate Section** on the toolbar.



5. NAPIS SRT displays any errors in the *Errors* pane displayed below the Work pane.
6. Double click on the description of the error and the data entry cell will highlight where the error is in the section so you can make the correction.
7. If the section was successfully validated, a check appears on the appropriate section tab.

Validating a Report

Even if you have validated each section within an SPR, you still need to validate the whole report to be able to submit your report to the AoA. If you have not yet entered data into certain parts of the report, *Validate* skips over non- required sections with all zeros.

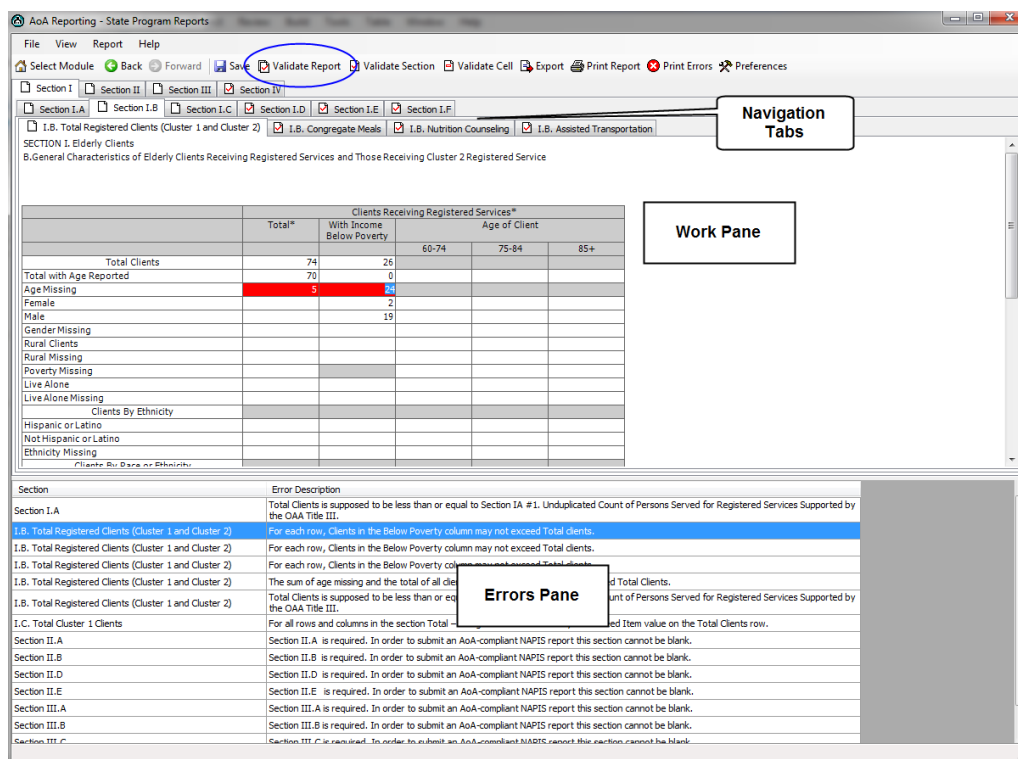
When you validate a program, an *Error* pane appears in the lower portion of the screen. Numbers in any cells related to the errors change color. You can customize the colors that NAPIS SRT uses for error cells. See ***Changing Report Colors*** for more details.

All sections listed below must have values (non-zero) and be error free before NAPIS SRT can export the SPR to an SRT file ready for transmission.

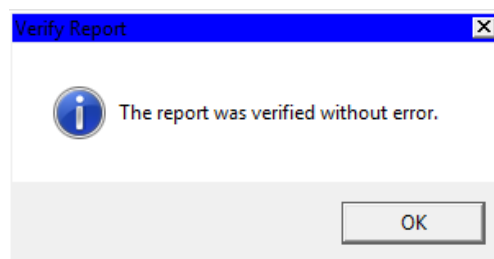
- I.A
- II.A
- II.B
- II.C
- II.D
- III.A
- III.B
- III.C
- III.D

➤ ***To validate a report for submission***

- 1.** Open an existing report.
- 2.** Click **Validate Report** on the toolbar.
- 3.** NAPIS SRT displays the *Report Data Entry* screen. It takes a minute or two for the program to validate the whole report.



4. NAPIS SRT displays any errors in the *Errors* pane displayed below the *Work* pane.
5. Double click on the description of the error and the data entry cell will highlight where the error is in the section so you can make the correction.
6. If the report was successfully validated, the program prompts you. Click **OK** at the prompt. Click **Save and then Back** to save and close the validated report.



Correcting Errors

After validating a report or section, you may see a list of errors that NAPIS SRT has found. In a report as complex as the SPR, it can be difficult to find which

piece or pieces of data are causing the problems. Try these ideas to help resolve report errors:

- You can print out the errors in the *Error* pan if it makes it easier for you to read. When the *Error* pane is in view, press **Print Errors** from the toolbar.
- Use the *Error* pane to easily move through the sections that are causing problems. Highlight an error double-click on it to go to the appropriate section.
- If it's not easy for you to see which cells are causing problems, try changing the color of the error cells. See **Changing Report Colors** for details.
- Try printing or exporting a section to see the data in a different format. See **Printing a Section** and **Exporting a Section** for detailed instructions.

Printing Errors

You can print the list of errors found in the *Errors* pane.

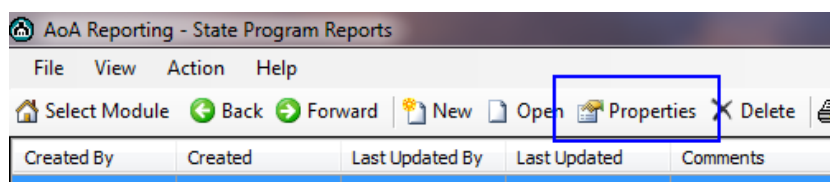
➤ **To print a list of errors**

1. Open an existing report.
2. Click **Validate Section or Validate Report** on the toolbar.
3. NAPIS SRT displays all errors found in the *Errors* pane.
4. Click the **Print Errors button on the top toolbar**.
5. Click **Print** to send the list of errors to your local printer

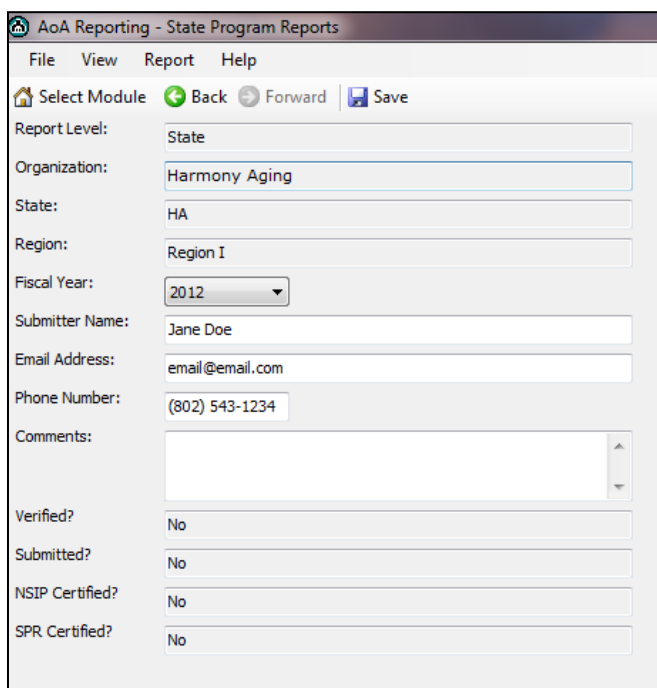
Viewing and Editing Report Properties

➤ **To view and/or edit the properties of a report**

1. Navigate to the Reports list.
2. Highlight the report you'd like to edit and press **Properties**.



3. The following fields are editable: *Fiscal Year, Submitter Name, Email Address, Phone number and Comments.*



AoA Reporting - State Program Reports

File View Report Help

Select Module Back Forward Save

Report Level: State

Organization: Harmony Aging

State: HA

Region: Region I

Fiscal Year: 2012

Submitter Name: Jane Doe

Email Address: email@email.com

Phone Number: (802) 543-1234

Comments:

Verified? No

Submitted? No

NSIP Certified? No

SPR Certified? No

4. When finished viewing or editing properties, click **Save**.

Deleting Reports

➤ **To remove a report from NAPIS SRT**

1. Navigate to the Reports list.
2. Highlight the report you'd like to edit and press **Delete** on the toolbar.
3. At the prompt, click **Yes** to continue or **No** to cancel.

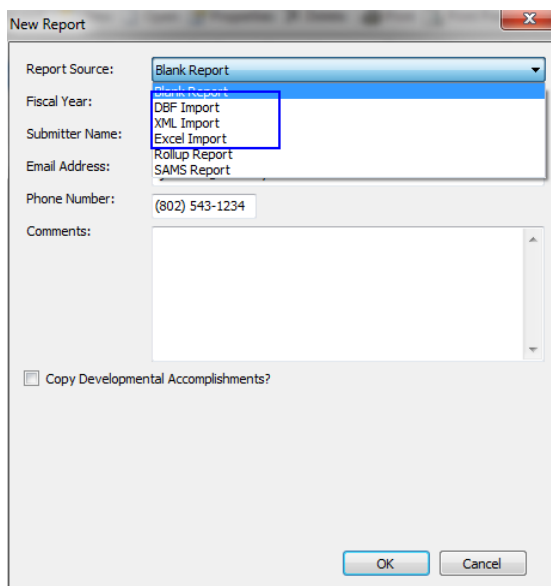
Importing Reports

NAPIS SRT can import reports from DBF, XLS, and XML files. DBF, XLS and XML files allow you to import data into NAPIS SRT from an outside database via .dbf or .xml files in order to populate your annual or quarterly reports.

➤ **To import files into NAPIS SRT**

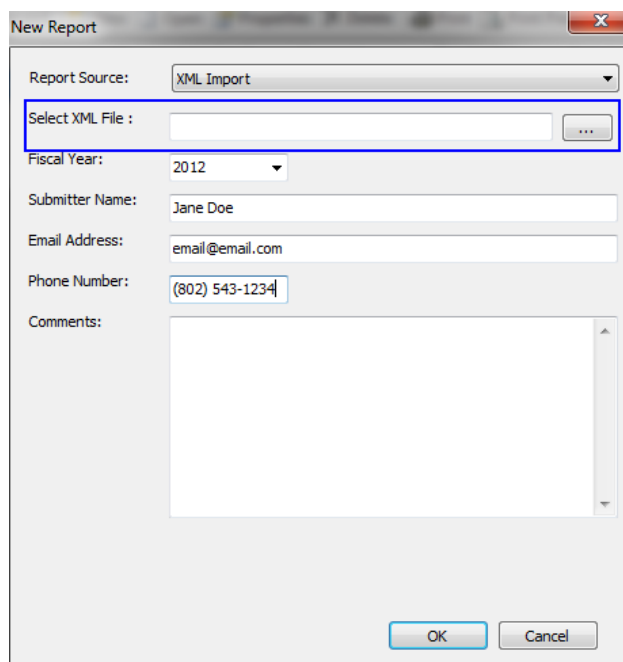
1. Navigate to the Reports list.

2. Press New on the toolbar.



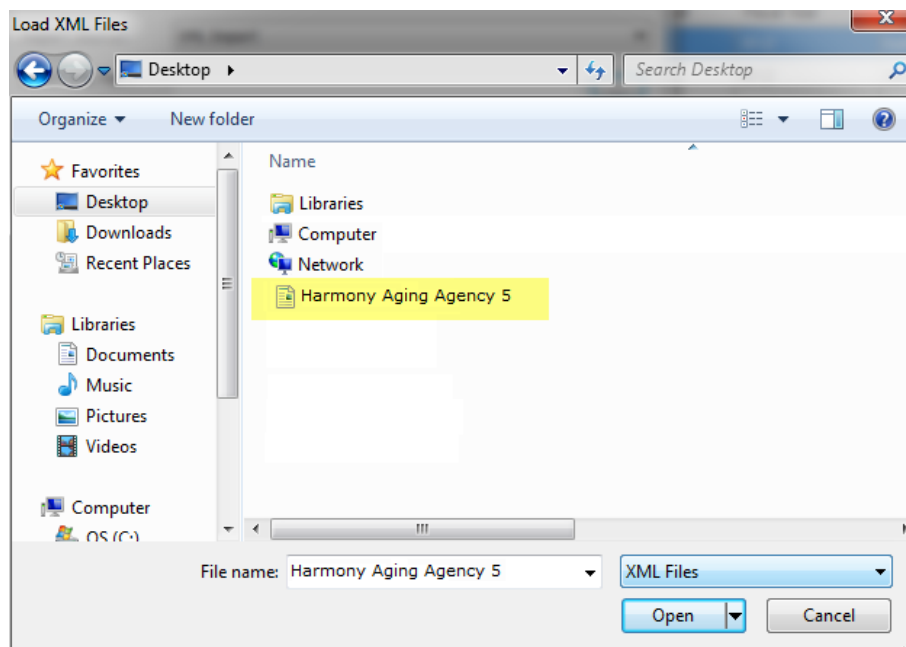
The 'New Report' dialog box is shown with the 'Report Source' dropdown menu open. The menu options are: Blank Report, DBF Import, XML Import, Excel Import, Rollup Report, and SAMS Report. The 'DBF Import' option is highlighted. Other fields in the dialog include Fiscal Year, Submitter Name, Email Address, Phone Number, and Comments. A checkbox for 'Copy Developmental Accomplishments?' is at the bottom left. 'OK' and 'Cancel' buttons are at the bottom right.

3. Choose DBF Import, XML Import or Excel Import.
4. Once you choose a third party import option, the browse dialog will appear.



The 'New Report' dialog box is shown with 'XML Import' selected in the 'Report Source' dropdown. The 'Select XML File' field is highlighted with a blue border, and a browse button (three dots) is visible to its right. Other fields include Fiscal Year (2012), Submitter Name (Jane Doe), Email Address (email@email.com), Phone Number ((802) 543-1234), and Comments. 'OK' and 'Cancel' buttons are at the bottom right.

5. Browse to the file using the browse dialog.



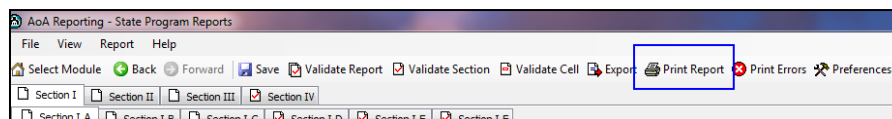
6. In the *Import* screen, select the file you want to import and click Open.
7. Click **OK** at the prompt and the new report will be created, automatically populated with the data found in the file.

Printing Reports

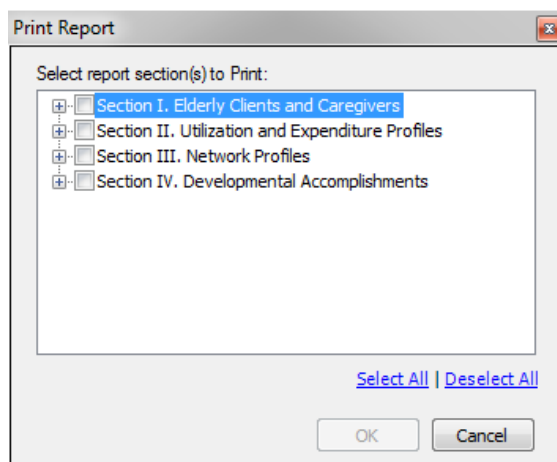
NAPIS SRT can print individual sections from a report or the entire program report. When you click **Print Report** from within an open report NAPIS SRT brings you to the *Print Report* screen. *Print Report* allows you to determine which sections you would like to print.

➤ **To print out a report**

1. From within an opened report, press the Print button on the toolbar.



2. Use the plus buttons to expand the areas within the Print Report screen and select specific sections that you'd like to print. If you'd like to print the entire report, press Select All.



3. Select a Printer. Change printer **preferences** as needed.
4. Click **Print** and the sections you selected will be sent to your specified printer.

Exporting Reports

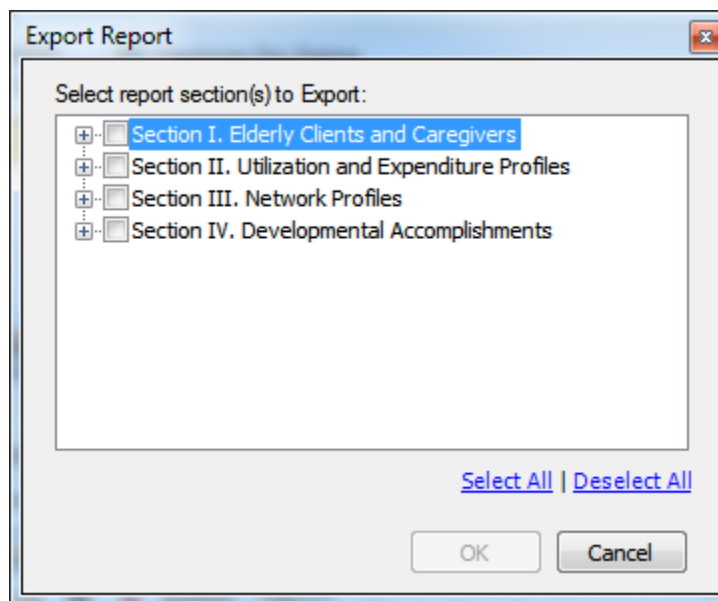
Use the NAPIS SRT export feature to export report data into Microsoft Excel® and other third party programs. Files created using the export feature cannot be imported by NAPIS SRT.

Here's a list of the export options offered by NAPIS SRT:

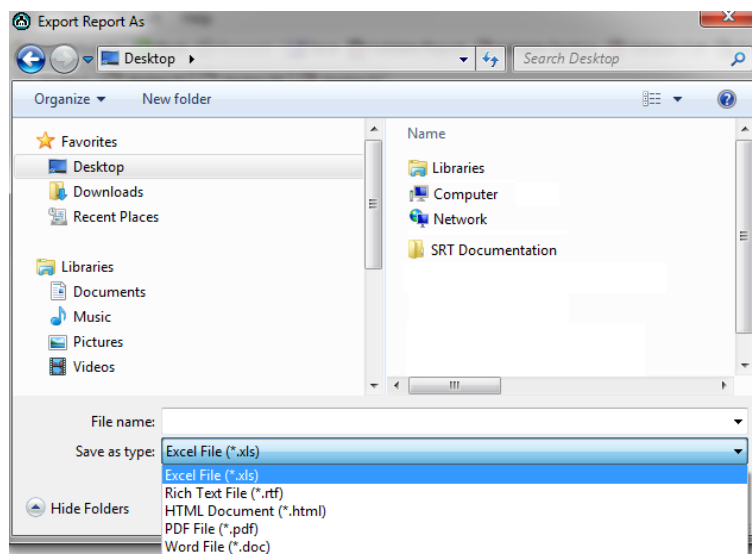
- Adobe Portable Document (.pdf) - a read-only format. PDFs are typically opened with Acrobat Reader.
- MS Excel (.xls) - outputs formatted data to an Excel spreadsheet.
- MS Word® - convert the section into a Microsoft Word document.
- HTML 4.0 (.htm) - HTML stands for **HyperText Markup Language**. This is a file format primarily used for publishing to Web pages.
- Rich Text File (.rtf) - a plain text file.

➤ ***To export a report***

1. From within an opened report, press the Export button.



2. Select the specific sections that you'd like to export. To export the entire report, press Select All.
3. Press OK
4. Select a file format in the screen that appears.



5. Select a location to save the file.

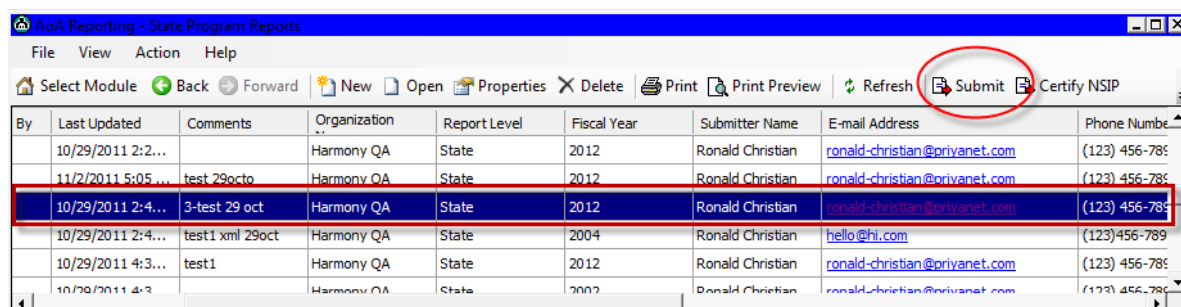
6. Click **Save**.

Submitting a Report

You can only submit a report to AoA once it has been Validated.

➤ **To submit a report to AoA**

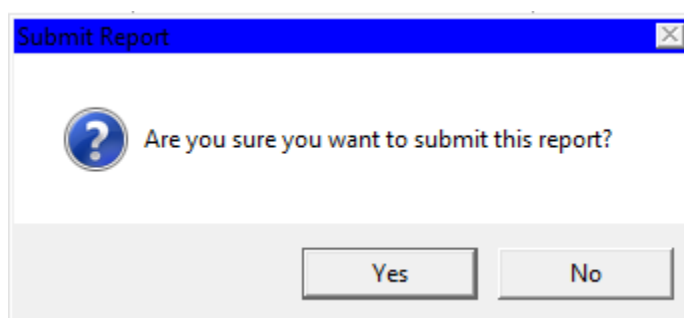
1. Navigate to the Reports list.
2. Confirm that the report you want to submit had been validated by looking for a check in the *Verified?* column. (If your report has not yet been validated, see Validating a Report for instructions.)
3. Highlight the report you want to submit, then click the **Submit** button on the toolbar.



4. You will be prompted to confirm your report submission. Click **Yes** to continue.
5. After submitting your report the Submitted checkbox will be filled in and you will receive an automated confirmation e-mail from AoA confirming that the report submission was received. The confirmation e-mail will be delivered to the e-mail address that was entered on the Properties screen when the report was created. To edit or add an e-mail address prior to submitting, see **Viewing and Editing Report Properties**.

➤ **To re-submit a report to AoA**

1. Highlight the report you want to re-submit, then click the **Submit** button on the toolbar.
2. You will be prompted to confirm that you wish to re-submit the report. Click **Yes** to continue.



3. After re-submitting your report you will receive an automated confirmation e-mail from AoA confirming that the report submission was received. The confirmation e-mail will be delivered to the e-mail address that was entered on the Properties screen when the report was created. To edit or add an e-mail address prior to re-submitting, see ***Viewing and Editing Report Properties***.

Certifying NSIP Data

NAPIS SRT gives state users the ability to certify that the NSIP numbers in their validated reports are correct. After a State User certifies that the NSIP numbers are correct, a checkmark will appear in the *NSIP Certified by State?* column. When AoA certifies that the NSIP numbers in the report are correct, a checkmark will appear in the *NSIP Certified by AoA?* column. NSIP data in reports that have not been validated cannot be certified.

➤ ***To certify the NSIP data in a report***

1. Select a validated report from the List screen and click the **Certify NSIP button** on the toolbar.
2. You will be prompted to confirm the certification of the NSIP data. Click **Yes** to continue.
3. In the Certify NSIP screen that appears, check the *I Agree* checkbox, then enter *Your Name*, *Your Title* and any *Comments*.

4. Click *Certify* to complete the process.
5. A checkmark will then appear in the *NSIP Certified by State?* column.

Certifying SPR Data

NAPIS SRT gives State users the ability to certify that the data in their validated SPRs are correct. After a State User certifies that the data in the SPR is correct, a checkmark will appear in the *SPR Certified by State?* column. When AoA certifies that the data in the SPR is correct, a checkmark will appear in the *SPR Certified by AoA?* column. SPRs that have not been validated cannot be certified.

➤ **To certify the data in a validated SPR**

6. Select a validated report from the List screen and click the **Certify SPR button** on the toolbar.
7. You will be prompted to confirm the certification of the report. Click **Yes** to continue.

8. In the Certify SPR screen that appears, check the *I Agree* checkbox, then enter *Your Name*, *Your Title* and any *Comments*.

Certify SPR

State ID: HA

Fiscal Year: 2012

Report Period: Annual State Program Report

By certifying this SPR I hereby declare that the information contained within is true and accurate to the best of my knowledge.

☒ I Agree

Your Name: name

Your Title: title

Comments: comments

Certify **Cancel**

9. Click *Certify* to complete the process.
10. A checkmark will then appear in the *SPR Certified by State?* column.

Note: The checkbox in the "Locked" column will be checked for report within fiscal years that AoA has locked down for editing. If AoA locks down 2010, for instance, then any report submitted in 2010 will no longer be editable.

User Customizations

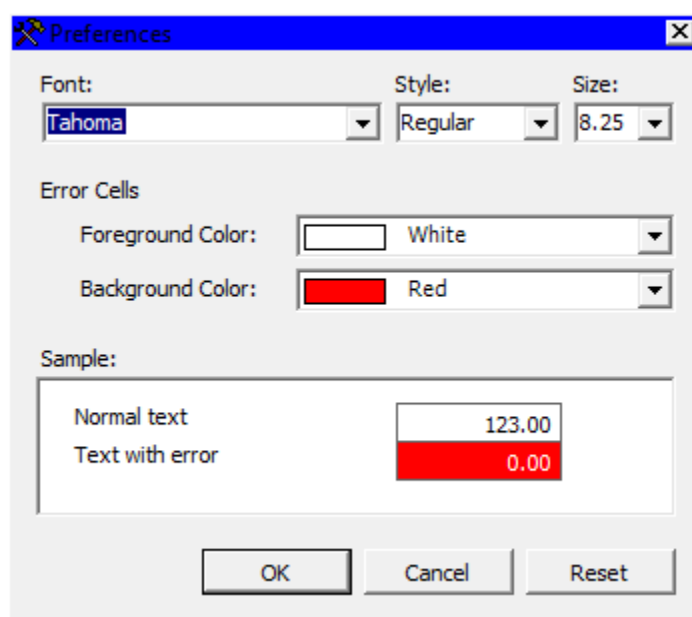
Users are provided with various tools that they can use to facilitate data entry.

Changing Report Fonts

You can customize the fonts that NAPIS SRT uses in from within any opened report.

➤ ***To change the font used in a program report***

1. In an open report, click **Preferences** in the toolbar.



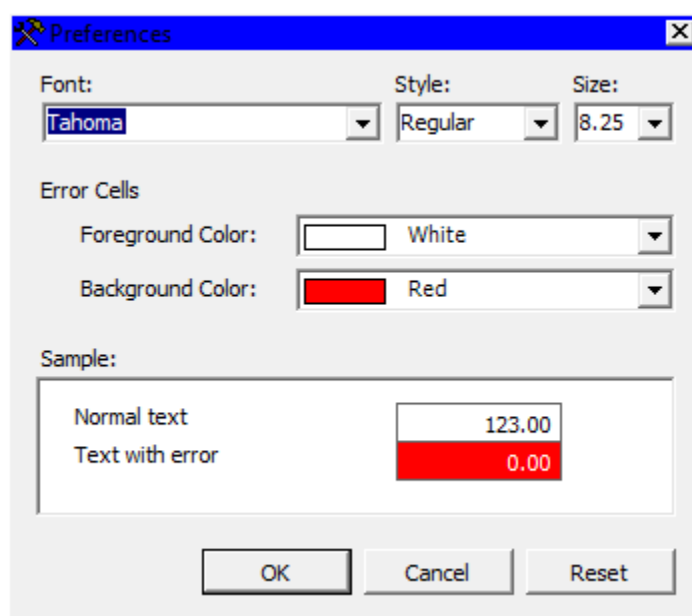
2. Select the desired font form from the **Font** dropdown list.
3. Select the style from the **Style** dropdown list
4. Select the font size from the **Size** dropdown list.
5. As you make your selections, the Sample window will display the changes.
6. Click **OK** to save your changes.

Changing Report Colors

You can customize the colors that NAPIS SRT uses in error messages from within any opened report.

➤ ***To change the colors used in error messages***

1. In an open report, click **Preferences** in the toolbar.



2. Select the desired color from the **Foreground Color** dropdown list.
3. Select the desired color from the **Background Color** dropdown list.
4. As you make your selections, the Sample window will display the changes.
5. Click **OK** to save your changes.